

Zurich CapitalFund investment plan “Swiss Dividend ETF”

Would you like to benefit from yield opportunities of first-class Swiss companies with high dividend payouts? Then this investment plan is just right for you.



Your benefits at a glance

- High growth opportunities thanks to focus on high-dividend equities
- Low fees thanks to efficient and cost-effective tracking of an index (ETF)
- Tax-free payout and income thanks to life insurance tax privilege

Who benefits from the Swiss Dividend ETF Plan?

Clients who

- are looking for an equity investment with focus on Switzerland
- have a longer-term investment horizon
- accept the risk of increased price fluctuations.

Detailed information

With this investment plan you invest in the “iShares Swiss Dividend ETF” fund. The fund tracks the “SPI[®] Select Dividend 20” equity index, which includes the 20 Swiss equities with the highest dividends and returns on capital of the “Swiss Performance Index (SPI)”. The maximum weighting of an individual security is 15%.

Additional fund units are acquired with dividend distributions from the fund, which increases the investment assets.

Facts about the fund:

- ISIN: CH0237935637
- Currency: CHF

The largest fund positions are Zurich Insurance Group AG, Novartis AG and Nestle SA.

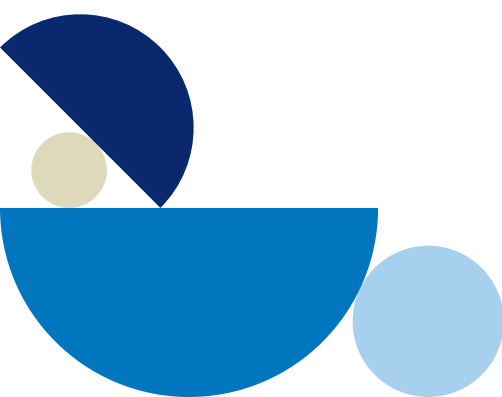
More information

Additional information on opportunities and risks as well as on past performance can be found on the fund provider's website and in the fund fact sheet.

Tax benefits

When acquiring shares or bonds, dividend and interest are taxable as income. Within the CapitalFund life insurance policy, the maturity benefit is exempt from income tax under Pillar 3b, as is all income. Only the surrender value is subject to wealth tax during the term.


Within the framework of 3a restricted pension provision, the premiums can be deducted from taxable income. This allows you to save taxes year after year. When the capital is paid out, it is taxed separately from other income at the privileged pension rate.



Would you like to get advice or
further information?

Call us toll-free: 0800 80 80 80
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